

# Initial Assessment Contacts

**Note:** In order to create a case note, an assignment to the case is not needed.

## Creating Case Notes on Assigned Cases

1. Create an initial assessment contact case note using one of two methods:
  - a) From the desktop, go to the Cases tab and click the Case Work hyperlink [Create case work](#). This will open the Create Case Work page.

On the Create Case Work page, select the Initl Assess Contact from the Assessment drop-down and select the Case. The selection of case participants is optional; use the 'ctrl' key to select more than one participant. If the contact is with someone who is not a participant with the case, do not select a name. Click Create. This will open the Case Notes page.

The screenshot shows the 'Create Case Work' web application. The sidebar on the left has a 'Create Case Items' section with various categories. The 'Assessment' category is selected, showing 'Initl Assess Contact' in a dropdown. The main area is divided into two panels: 'Cases' and 'Case Participants'. The 'Cases' panel lists several case entries with names and IDs, with 'Jones, Sally (9222753)' highlighted. The 'Case Participants' panel includes a note to 'Hold down the "Ctrl" key for multi-selection' and lists several participants with names and IDs. At the bottom right, there are 'Create' and 'Close' buttons.

- b) Or from your desktop, select Create Case Note from the Actions drop-down next to the specific case. This will open the Case Notes page.

<b>Jones, Sally (9222753)</b> <b>Case details:</b> CPS Family - Initial Assessment BMCW-Admin Intensive In-Home Open OHP exists for associated participant(s)			<b>Case address:</b> 123 Main Street Waldo, WI 53093 (262) 555-1212			<b>Primary worker:</b> Daisy, Dan (440) 943-7690 <a href="mailto:dan.daisy@wisconsin.gov">dan.daisy@wisconsin.gov</a>		
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Case Note Criteria Search  
 Create Assignment  
 Create Case Note  
 Create Case Work  
 Create Meeting  
 Print Case Record  
 View Tasks  
 Please select an action ▲

2. On the Case Notes page, the top of the page pre-fills with the Case Name, Worker Creating Note, Worker Making Contact, and Date Entered. There is an option to Search out the Worker Making Contact if it is not the same as the person entering the case note. The note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked, 30 days have passed, or the Assessment is approved by a supervisor, the note will be frozen and not editable.
3. In the Note Information group box, the Date and Begin Time are required user entered fields. Case Notes created via Create Casework will automatically pre-fill the Category and Type with Initl Assess Contact and Face-to-Face, respectively. If creating the Case Note via Actions, select these values on the Category and Type drop-downs.
4. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.
5. The Participants in the case, which includes case participants and collaterals, display on the right side. You can use 'Ctrl' key to multi-select additional participants.
6. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For policy guidance, place your mouse over the 'Details.'
7. Notice the scroll bar to the right. The page is too big to display the entire contents. Use the scroll bar to view the bottom of the page.

Case Notes - Windows Internet Explorer

**eWiSACWIS** Print Spell Check Help

Case: Jones, Sally ( 9222753) Worker Creating Note: Cake, Caitlin M. Worker Making Contact: Cake, Caitlin M. [Search](#)

Case Note ID: 9223452 Date Entered: 02/06/2012 02:22 PM ☐ Note Finalized ☐ Contact By Designee

**Note Information**

Date: 02/06/2012 Category: Initial Assess Contact ☐ View Inactive Participants

Begin Time: 01:00 AM PM Type: Initial Face-to-Face

End Time: 00:00 AM PM Type Detail:

Duration: 0000.0 Face-to-Face Location: Details Home Visit

☐ Billable Face-to-Face Result: Occurred

Participants:

- Jones, Dirk (Present Spouse)
- Jones, Mary (Bio Child)
- Jones, Robert (Bio Child)
- Jones, Sally (Reference Person)
- Jones, Tammy (Bio Child)
- Jones, Tommy (Bio Child)

Hold down the 'Ctrl' key for multi-selection  
[Add Contacts](#)

**Narrative**

Case Note 1/1 [Details](#)

Enter narrative text here...

[More...](#) [Less...](#) [Default](#)

Options:  [Go](#) [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

Done Trusted sites | Protected Mode: Off 100%

8. Below the Narrative group box is an expando with Assessment Contact Information.

The Begin Date field is a drop-down value displaying the 'Date and Time Report was Received' for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered. The 'Add Contacts' hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

The screenshot displays the eWiSACWIS web application in a Windows Internet Explorer browser window. The interface includes a header with the application name and navigation links (Print, Spell Check, Help). Below the header, there is a 'Narrative' section with a text area for 'Case Note 1/1' and a 'Details' link. The 'Assessment Contact Information' section is expanded, showing a 'Begin Date' dropdown set to '02/03/2012 12:25 PM'. A table lists two contacts: 'Jones, Sally' and 'Jones, Tommy', both with a contact date of '02/06/2012 01:00 PM'. Each contact has a 'Delete' link. An 'Insert' button is located below the table. At the bottom, there are buttons for 'Options', 'Go', 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'. The browser status bar at the bottom indicates 'Trusted sites' and 'Protected Mode: Off'.

Name	Affiliation	Title	Contact Date	
Jones, Sally			02/06/2012 01:00 PM	Delete
Jones, Tommy			02/06/2012 01:00 PM	Delete

9. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.

10. To create an Initial Assessment Contact from the Assessment, click on the pending Assessment from your desktop. This will open the Assessment page.

**Jones, Sally (9222753)**

**Case details:**  
CPS Family - Initial Assessment  
BMCW-Admin  
Intensive In-Home  
Open OHP exists for associated participant(s)

**Case address:**  
123 Main Street  
Waldo, WI 53093  
(262) 555-1212

**Primary worker:**  
Daisy, Dan  
(440) 943-7690  
[dan.daisy@wisconsin.gov](mailto:dan.daisy@wisconsin.gov)

**Actions:**  
[Please select an action ▲](#)

**View case information**

[Access Reports](#) [Agreements and Notices](#) [Assessments](#) [Assets and Income](#)

[Assignments](#) [Background Checks](#) [Case/Permanency Plan](#) [Eligibility](#)

[Narratives](#) [Placements](#) [Planning](#) [Related People](#)

[Safety](#) [Serious Incident Notification](#)

**Assessments**

<a href="#">Assessment</a>	06/14/2017	Pending	
<a href="#">Assessment</a>	06/08/2015	Substantiated	
<a href="#">Assessment</a>	10/01/2012	Substantiated	<a href="#">Serious Incident Notification</a>
<a href="#">Assessment</a>	02/06/2012	Substantiated	<a href="#">Serious Incident Notification</a>

11. On the Assessment page, click on the Results tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.

Assessment - Windows Internet Explorer

**eWiSACWIS** TM Print Spell Check ABC Help ?

**Assessment**  
Name: Jones, Sally      Assessment ID: 9222036      Status: Open

**Report**  
Response Time: Within 5 business days      Date: 02/03/2012

**Participants**      **Basic**      **Allegations**      **Contacts**      **Results**

**Assessment Results**  
Result: **Substantiated**

**Disposition**

**Family RA Future A/N**  
Abuse Score:  
Neglect Score:  
Risk Level:

**Safety Assessment**  
Safety Decision: **Unsafe**

**Strengths and Needs**  
Needs Level:

**Initial Face-to-Face Contact Information**  
Initial Face-to-Face Must Occur By: 02/10/2012 12:25 PM      [CPS Report 9238179](#)      [Create Initial Face-to-Face Contact Note](#)  
Initial Face-to-Face Documented:

Options:  [Go](#)      [Save](#)      [Close](#)

Done      [Trusted sites](#) | Protected Mode: Off      [100%](#)

12. On the Case Note page, the Category and Type will pre-fill.

Case Notes -- Webpage Dialog

**eWiSACWIS** Print Spell Check ABC Help ?

Case: Jones, Sally ( 9222753) Worker Creating Note: Cake, Caitlin M. Worker Making Contact: Cake, Caitlin M. [Search](#)

Case Note ID: 9223452 Date Entered: 02/06/2012 02:22 PM ☐ Note Finalized ☐ Contact By Designee

**Note Information**

Date: 02/06/2012 Category: Initl Assess Contact ☐ View Inactive Participants

Begin Time: 01:00 AM PM Type: Initial Face-to-Face Participants:

End Time: 00:00 AM PM Type Detail: Face-to-Face Location: Home Visit Jones, Dirk (Present Spouse)

Duration: 0000.0 Face-to-Face Result: Occurred Jones, Mary (Bio Child)

☐ Billable Jones, Robert (Bio Child)

Jones, Sally (Reference Person)

Jones, Tammy (Bio Child)

Jones, Tommy (Bio Child)

Hold down the 'Ctrl' key for multi-selection

[Add Contacts](#)

**Narrative**

Case Note 1/1 [Details](#)

Enter narrative text here...

[More...](#) [Less...](#) [Default](#)

Options:  [Go](#) [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

13. In the Note Information group box, enter the Date and Begin Time.

14. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.

15. The Participants in the case are shown on the right side. You can use 'Ctrl' key to multi-select additional participants.

16. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For case worker contact policy guidance, move your mouse over the 'Details' flair.

17. Scroll to the bottom of the page to update the Assessment Contact Information group box.

18. The Begin Date field is a drop-down value displaying the 'Date and Time Report was Received' for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered. The 'Add Contacts' hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

The screenshot shows the eWiSACWIS web application running in a Windows Internet Explorer browser. The page has a purple header with the eWiSACWIS logo and navigation links (Print, Spell Check, Help). Below the header, there is a section for 'Narrative' with a text area for 'Case Note 1/1' and a 'Details' link. Below the narrative section is the 'Assessment Contact Information' section, which is expanded. It features a 'Begin Date' dropdown menu set to '02/03/2012 12:25 PM'. Below this is a table with columns: Name, Affiliation, Title, Contact Date, and a 'Delete' link. The table contains two entries: 'Jones, Sally' and 'Jones, Tommy', both with a contact date of '02/06/2012 01:00' and radio buttons for AM/PM. Below the table is an 'Insert' button. At the bottom of the page, there are buttons for 'Options', 'Go', 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'. The browser's status bar at the bottom shows 'Done', 'Trusted sites', 'Protected Mode: Off', and a zoom level of '100%'.

Name	Affiliation	Title	Contact Date	
Jones, Sally			02/06/2012 01:00	<input type="radio"/> AM <input checked="" type="radio"/> PM <a href="#">Delete</a>
Jones, Tommy			02/06/2012 01:00	<input type="radio"/> AM <input checked="" type="radio"/> PM <a href="#">Delete</a>

19. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.